ProNovia SAP PLM Administrator

User Manual

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1 Introduction

This document describes basic processes, functions and operations of ProNovia SAP PLM Administrator.

1.1 Other documents

All relevant and available documents can be found in the ProNovia Support Center: http://support.pronovia.ch.

1.2 Prerequisites

Prerequisites for using ProNovia products:

- ProNovia products to be used must be installed and setup correctly on the relevant systems.

- ProNovia products must be properly integrated, activated and configured. Details see document *ProNovia Basic Library, Integration and Enhancement Manual*.

- To use ProNovia products, valid licenses for each product must be loaded on each system. Details see document *ProNovia Basic Library, Integration and Enhancement Manual*.

- The necessary permissions for the display and maintenance of SAP objects must be present.

1.3 Abbreviations

Some abbreviations used in the ProNovia documents:

Abbreviation	Stands for
ADM	ProNovia SAP PLM Administrator
AFW	ProNovia Application Framework
C5C	ProNovia SAP PLM CATIA-V5-Conversion (CENIT)
CHD	ProNovia SAP DMS ChangeDoc
DMC	ProNovia SAP DocumentManagementClient
ESB	ProNovia SAP EasyBrowse
GCP	ProNovia SAP PLM ProcessManager Generic CAD Plugin
MMS	ProNovia SAP MaterialMasterSupport
MSC	ProNovia SAP PLM StructureControl
MSO	ProNovia SAP DMS MSOfficeIntegration
OBJ	ProNovia Object Services
OLM	ProNovia SAP ObjectLifecycleManager
PBL	ProNovia SAP PLM PRM DynamicBaseline
PCF	ProNovia SAP Client Framework
PCM	ProNovia SAP PLM ChangeManager
PLC	ProNovia SAP PLM Client
PRM	ProNovia SAP PLM ProcessManager
PRL	ProNovia SAP PLM ProcessManager LogisticExtension
PBL	ProNovia SAP PLM PRM DynamicBaseline
SDF	ProNovia SAP DMS FrameWork

Abbreviation	Stands for
UGC	ProNovia SAP PLM UG-Conversion (Marenco)
UTI	ProNovia Basic Library

More terms are described in the ProNovia SAP PLM Glossar.

1.4   Symbols in this document

In this document following symbols may be used:

	Important or critical hint, to pay special attention to.
	Additional information.
	BusinessAddIns (BAdi) are available. They are described in the corresponding *Installation and Enhancement Manual*.
	Function protected by SAP authorization.

2   User Interface

The user interface of ProNovia SAP PLM Administrator is a function menu as well as an information interface and desktop for the ProNovia SAP PLM Administrator.

For all supported SAP Objects the most relevant data will be displayed, the user interface allows direct navigation between those SAP objects and direct display of document originals. SAP objects, which have been handled, will be marked in the object list for a fast future access.

2.1   Start ProNovia SAP PLM Administrator

ProNovia SAP PLM Administrator will be started with transaction „/PRONOVIA/ADM".

SAP Command Field

Transactions from a reserved name space in the SAP command field must start with a /N. Entries in the SAP Easy Access Menu do not need the prefix.
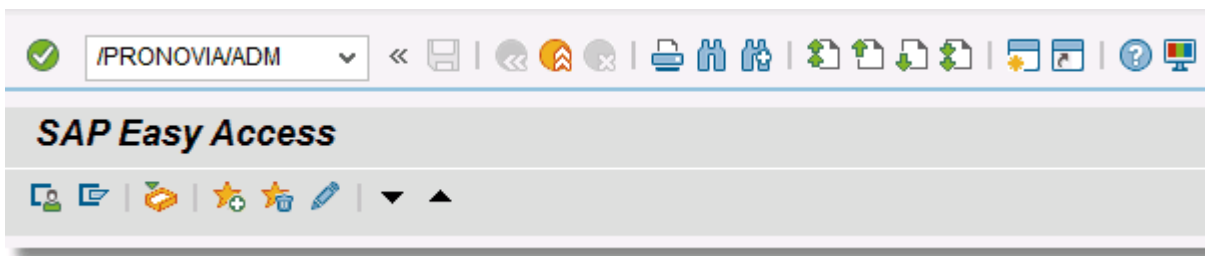
Entry via SAP Easy Access Menu

No prefix required.
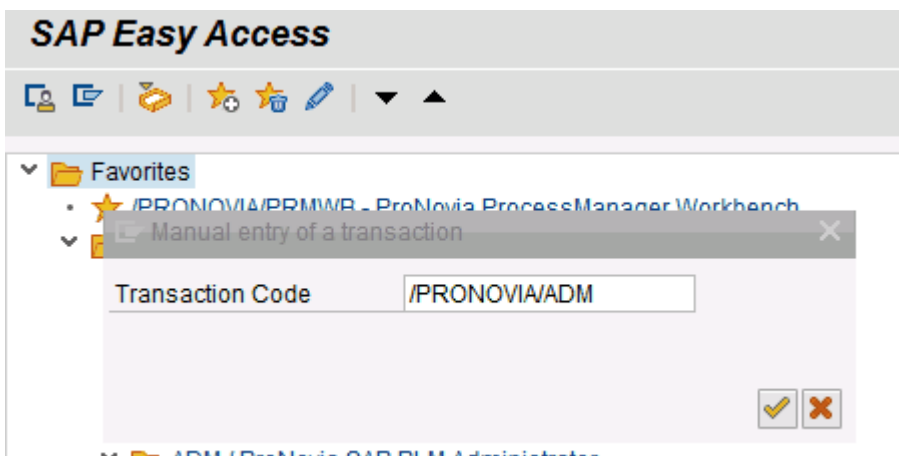
Start in ABAP

ProNovia SAP PLM Administrator can be called with the following function call.

```
CALL TRANSACTION '/PRONOVIA/ADM'.
```

2.2   Interface Structure
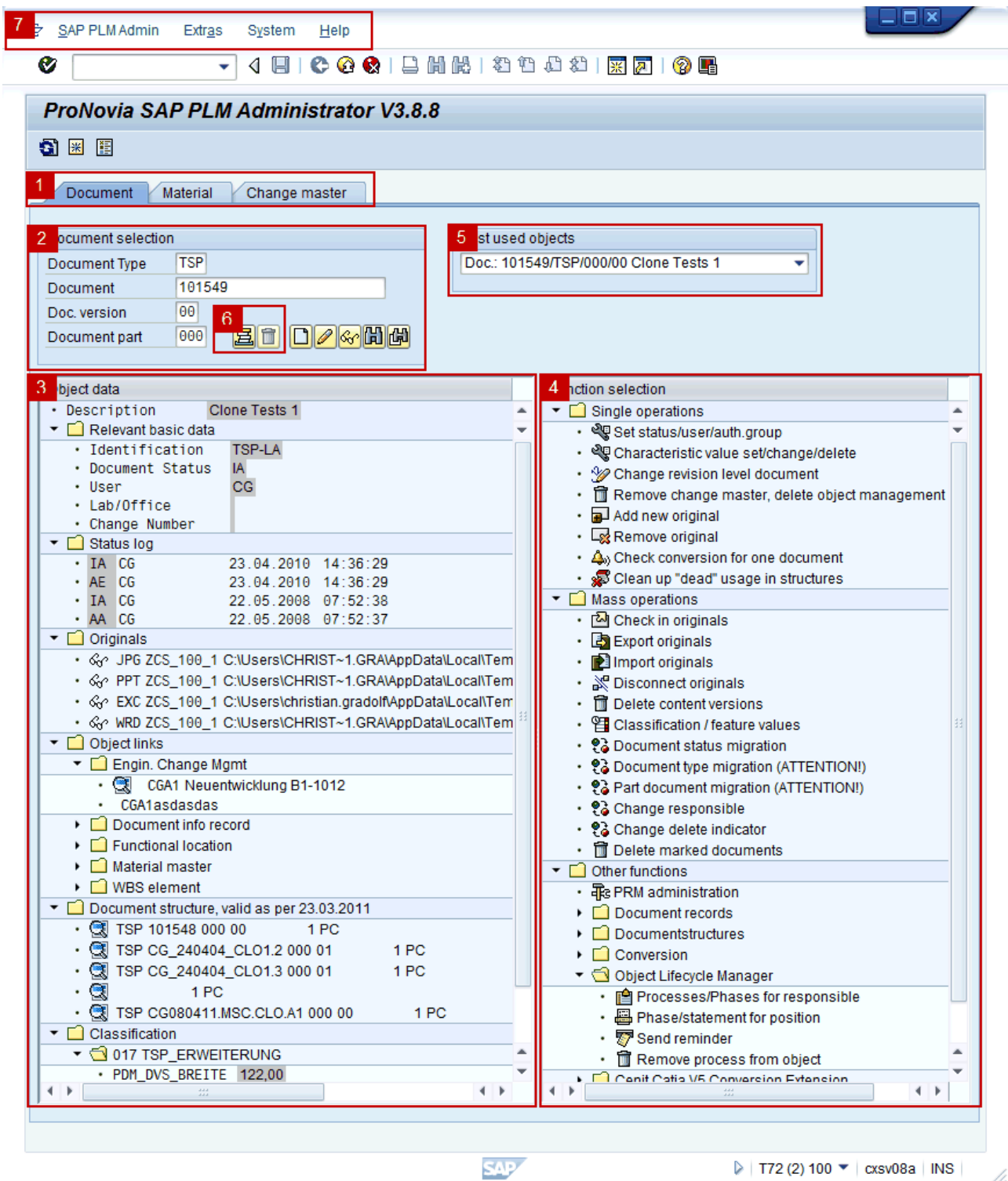
Object Type Selection (1)

For navigation between different object types the tabs (document / material / change master) can be used.

Object Selection (2)

Selection of SAP object to be handled. SAP standard search helps are available.

Documents can also be found using the SAP DMS search function. With a double click on the preferred document in the resulting selection list, the document will be transferred to the ProNovia SAP PLM Administrator. Additionally functions to create, display and handle are available.

Object Data (3)

This section displays the important data for the selected SAP object. In case of a reference to another SAP object it is possible jumping and displaying this object directly either with a double click on the field or a single click on the detail symbol of this object. A double click on the document original or the [symbol] symbol will display them.

Function Selection (4)

This section provides the functions for the selected SAP object. The functions are described in the following chapters.

Last Used Objects (5)

After manipulative actions, the SAP object will be marked in the SAP object list of ProNovia SAP PLM Administrator. The stored objects can be selected directly and the object will displayed. The current SAP object can be added to the list using button [image] or key „F6".

Work list (6)

Different search functions allow creating a work list of certain objects, which can be worked off later.
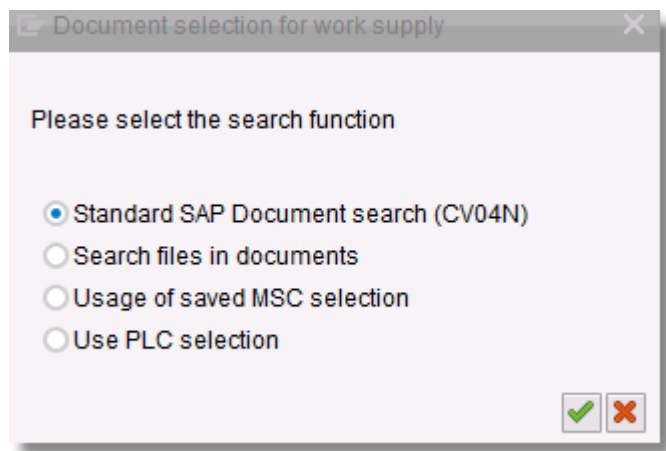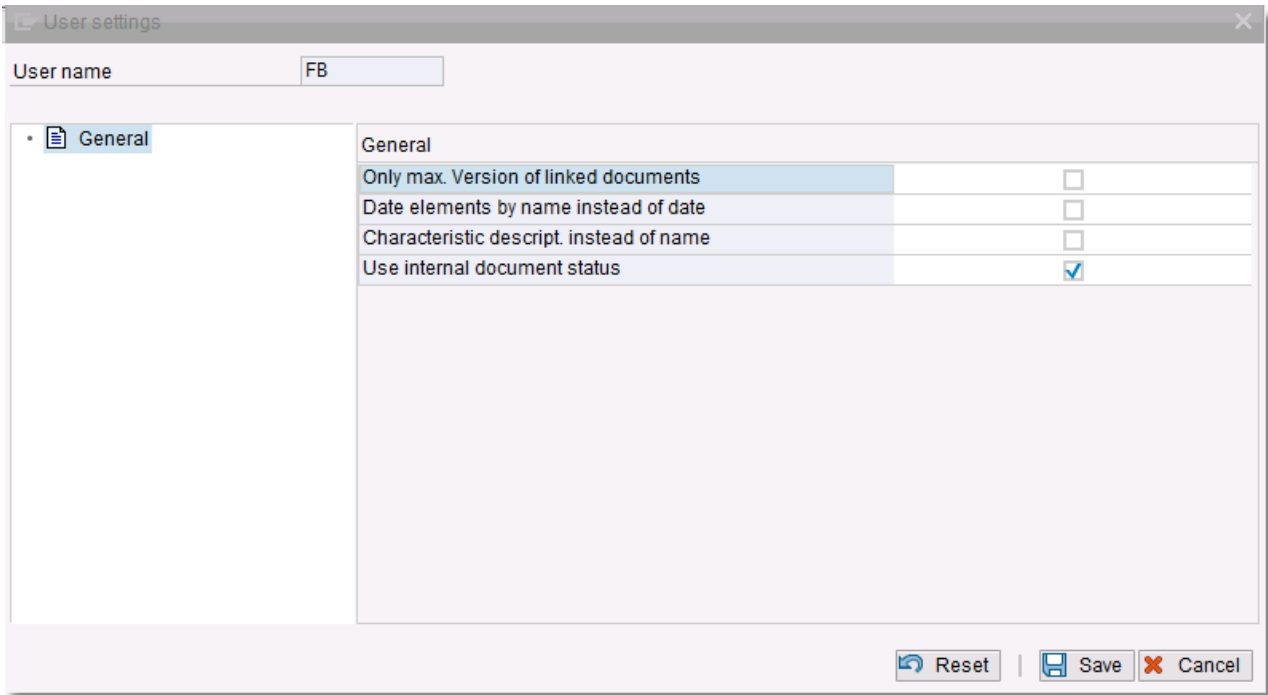
The creation of the work list can be initiated pressing button[image], which will then initiate the search mask. In case of an already existing work list, the button will navigate to the next object. The existing work list can be deleted with button [image].

Menu (7)

Object independent functions will be listed under „Extras".

2.3 User Settings

Using the Button ⊞ the user specifics settings are displayed and can be changed.

☐ **Only max. Vs of linked documents**

   If activated, only the highest version for linked documents will be displayed.

☐ **Date element by name instead of date**

   If activated, tab „Change master" will display the data elements by name.

☐ **Characteristic description instead of name**

   If activated the technical name for characteristic will be displayed.
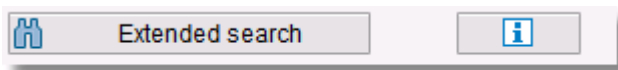
☐ **Use internal document status**

   For operations which will allow or require inputs of document status the selection field will be interpreted as internal document status. The search help will be adjusted accordingly.

2.4 Extended Search

Most mass operations as well as the work list, support an object search over the *extended search*, which provides a more flexible and more specific data selection. Also searching by valuation from the classification is possible.

For the creation of a work list, the extended search will always be used . For some mass operation it can be used manually. If provided, it will be displayed as follows.

The following search functions are available for the different objects.

- **Documents:**

  o Standard DMS document search (CV04N)

  o Search files in documents (search via attributes of document originals)

  o Saved ProNovia MSC selections

  o Saved ProNovia PLC selections

- **Material:**

  o Standard search help

  o Saved ProNovia MSC selections

  o Saved ProNovia PLC selections

- **Change master:**

  o Standard search help

  o Saved ProNovia PLC selections

When using the extended search for mass operations, the selections criteria from the selection screen of the according program will have no influence. But key fields which are relevant for a operation will always be interpreted.

Example:

- Mass function „Change person responsible in documents": Only document info records will be used, which match the field „Previous person responsible".

- Mass function „Migration Document types": Only documents with corresponding source document type will be selected.

- Mass function for characteristics: All fields of action parameters will be used.

ⓘ For back ground processing the extended search help is not available. An extended search for background jobs requires the implementation of customer exits, if available. See also document ADM Customizing Manual.

3 Functions for Document Info Records

This chapter describes the functions to maintain and manipulate document info records for document management system (SAP DMS).

The functions are divided into:

- Single Operations for document info records [12]

- Mass operations for document info records [17]

- Additional Functions for document info records [47]

3.1 Single Operations

The following single operations are provided:
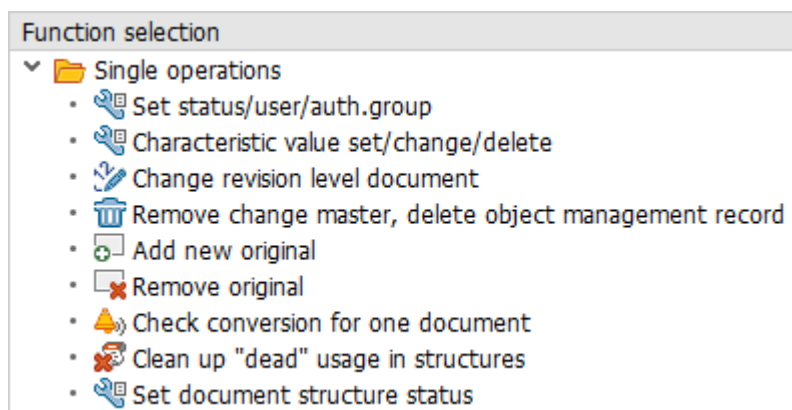
3.1.1 Set Status/User/Authorization Group/Process. Scenario

This function allows setting the document status, the user, the authorization group and/or the processing scenario. It will neither cause a check for actual state nor the user. The scenario can be selected via input help, die input is checked. It is also possible the set/change the date element on the change master for the document (and the subordinated objects) .

In order to change or set the authorization group, the SAP DMS authorization must be given.

Option „synchronize OLM" will only be available when ProNovia SAP ObjectLifecycleManager is installed on your system and when the object has been assigned to an OLM process.

The processing scenario can only be set if ProNovia SAP PLM ProcessManager is installed on your system and the document info record is PRM relevant.

Whether a change document will be written has to be defined in the customizing of ProNovia SAP PLM Administrator. It cannot be changed in this setting.

See also ProNovia SAP PLM Administrator Customizing Manual.

> **When changing a document status, no integrated processes will be triggered. The status will be set directly on the database, without further control (e.g. on PRM object dependencies). This may result in data inconsistencies, if the user is not aware of other dependencies or is not respecting them.**

The function is protected by authorizations. See also ProNovia SAP PLM Administrator Customizing Manual.

Customer Exit available to make checks and run actions before status change.

3.1.2 Set/Change/Delete Characteristic Value

Allows setting, changing and deleting single characteristic values, independent on the document status or settings in the characteristic definitions (e.g. display only).

Using the change management the validity of the characteristic value can be determined dependent on the key date or dependent on parameters. If the class type is set, this function cannot be used.

The function is protected by authorizations. See also ProNovia SAP PLM Administrator Customizing Manual.

Customer exit available to run actions before updating.

3.1.3 Change Revision Level of Document

Allows manual changing of the document info records revision level. It will only be checked, whether the entered revisions are allowed according to SAP standard customizing.

🔒 The function is protected by authorizations. See also ProNovia SAP PLM Administrator Customizing Manual.

ⓘ Multiple assignment of a revision level to the same document record (but different versions) is only supported when using the ProNovia SAP PLM ProcessManager.

3.1.4 Remove Change Number, Delete Object Management Record

Removes a change number from a document info record and deletes the corresponding object management record of the change master record. The action must be confirmed before it is execution.

🔒 The function is protected by authorizations. See also ProNovia SAP PLM Administrator Customizing Manual.

🛠 Customer exit available to run actions before the action.

3.1.5 Add New Original

These functions will add a new original or replace an existing original of a document info record, independent on the current document status and registered user.

When selecting the line with application „new" a new original will be added. When selecting an existing original it will be replaced.

🔒 The function is protected by authorizations. See also ProNovia SAP PLM Administrator Customizing Manual.

✖ Customer exit available to run actions before the action.

3.1.6 Remove New Original

This function allows removing or deleting an original or a single content versions from a document info record. The elements to be deleted must be marked.
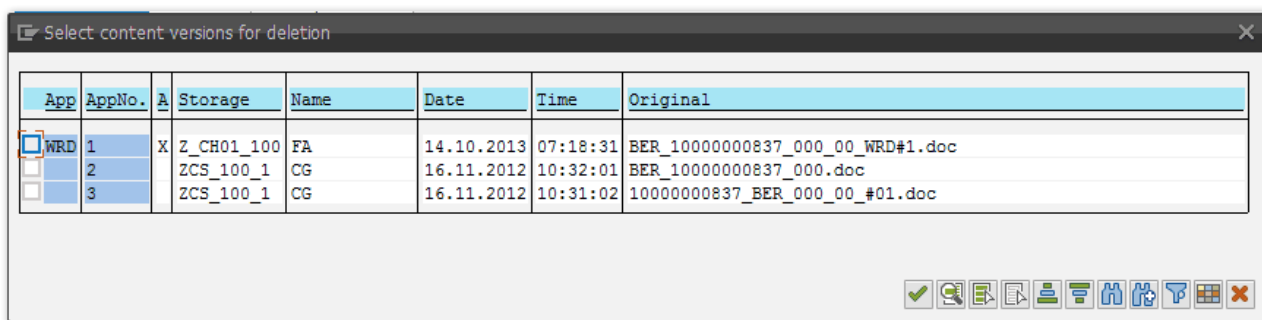

In case originals with content versions shall be deleted (marked in column "C") it will be enquired whether only single content versions shall be deleted.

When selecting option "No", all selected originals including all content versions will be removed. When selecting "Yes", the content version to be deleted must be selected:

Column „A" indicates the currently active version. If this version is deleted, the next existing version will become the active version.

Originals, which are deleted with this function, will be deleted permanently!
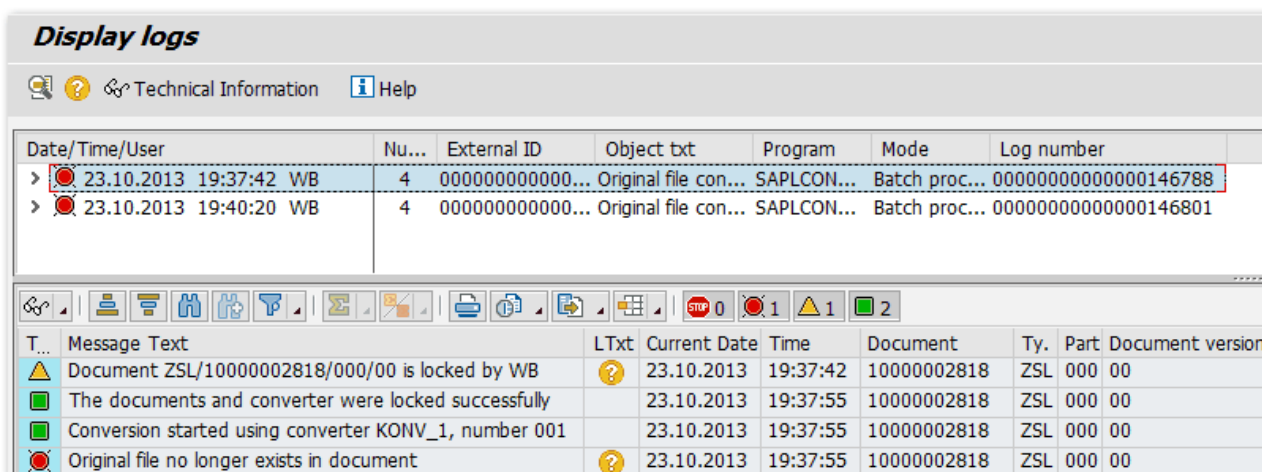
Customer exit available to filter files and run actions before the deleting.

3.1.7   Check Conversion Status for Document

This function will call the conversion status log for the current document.

The interface display will be similar to standard transaction CONV01, but all log entries for the current document will be selected and displayed. This way all conversions logs for a document will be shown directly and no further action is necessary.

3.1.8   Clean Up „Dead" Usage in Structures

Positions, which have been added or deleted with the same change number to a BOM, are not active and not visible anymore, however still existing in the BOM. This can cause problems during check of usage. E.g. a document cannot be marked for deleting, when it is still found in the BOM usage.

This function allows searching for these positions and removing them from the BOM.

The function is protected by authorizations. See also ProNovia SAP PLM Administrator Customizing Manual.

3.1.9   Set document structure status

This function allows setting the document structure status, if a structure has been created for this document.
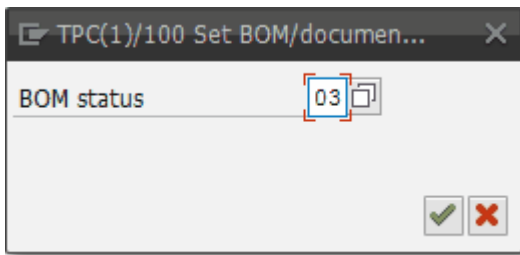
When changing a document structure status, no integrated processes will be triggered. The status will be set directly on the database, without further control (e.g. on PRM object dependencies).
This may result in data inconsistencies, if the user is not aware of other dependencies or is not respecting them.

The function is protected by authorizations. See also ProNovia SAP PLM Administrator Customizing Manual.

3.2   Mass Operations

The following mass operations are provided:

- Mass operations
  - Originals
    - Check in originals
    - Export originals
    - Import originals
    - Disconnect originals
    - Delete content versions
  - Classification / feature values
    - Classification / feature values
  - Migration
    - Document status migration
    - Document type migration
    - Part document migration
  - Field Conversion / Various
    - Document description copy
    - Change responsible
    - Authorization group migration
    - Change laboratory in DIS
  - Delete
    - Change deletion flag of document
    - Delete marked documents definitely

Authorizations

When a mass operation is handled wrongly it may have severe consequences. Therefore mass operations are protected and authorization is required. For mass operations on original files an additionally job-ID is required. In the customizing of the job it can be defined how and on which system the function can be executed.

Example for a definition of a scenario:

- Export to all systems allowed.

- Import only allowed for test system.

- Job-ID „CADUPLOAD" for import on productive system allowed.

For additional and more detailed information please refer to ProNovia SAP PLM Administrator Customizing Manual.

Message

All messages will be shown in a list during execution. In the background those messages will be registered in the job log. It is also possible to set option „optional log file" on the selection screen, where the messages will be recorded.

3.2.1   Originals

These functions allow checking-in, exporting, disconnecting original files as well as deleting content versions.

3.2.1.1   Check-In Originals

This function allows checking-in original files. In order to do so, the respective files must be accessible from the workstation which will execute this function.

The function is protected by authorization.

With customer exits the documents can be filtered additionally. Also client individual actions before and after the check in can be performed.

⊟ Selection Screen

Selection of document to search for checked-out originals			
Document type		to	
Document		to	
Part document		to	
Version		to	
Status		to	
Application		to	
User		to	
Change No.		to	
Laboratory / office		to	

KPro storage location

Vault storage location

☑ Selection list before check-in
☑ Test mode
☐ Delete file after check-in
☐ Search on server (always in batch mode)
Option log file

⊟ Selection Parameter

Parameter	*Parameter Description*
Document type	Search restriction by document type
Document	Search restriction by document number
Part document	Search restriction by part document
Version	Search restriction by document version
Status	Search restriction by document status
Application	Only originals of this application will be exported.
User	Search restriction by users
Change No.	Search restriction by change number
Laboratory / Office	Search restriction by laboratory and office
KPro storage location	Originals to document info records with activated KPro storage location option will be stored in this file system.
Vault storage location	Originals to document info records with activated vault storage location option, will be stored in this file system.(No activation of KPro in customizing for this document type.

Parameter	Parameter Description
Selection list before Check-In	List with originals which shall be checked-in will be displayed before execution.
Test mode	Only search for originals to be checked-in according the selection and display result.
Delete file after Check-In	If activated, the file will be removed from the source directory after it has been successfully checked-in.
Search on server (always batch mode)	If marked, the original will be read from the server.
Option log file	Created optional log file (See Mass Operations [17]).

ⓘ Depending on the user settings the document status is either an internal or external status. (See also chapter User Settings [10]).

ⓘ If the report is processed in the background, no selection list for further restrictions will be generated.

ⓘ If the report runs in the background, the data must be accessible on the SAP server. Background processing will always read data from the server.

3.2.1.2   Export Originals

The program allows exporting originals files of selected document info records. Example of usage:

- After a system copy the program can be used to export template originals, which can then be restored on the test system (see Import Originals [24]).

- Periodic extracts of Q-documents for publication on the intranet.

🔒 The function is protected by authorization (See also documentProNovia SAP PLM Administrator, Customizing Manual).

🛠 Documents can be additionally filtered with customer exits. Also name changes and client specific actions are possible.

☐ **Selection Screen**

Selection of originals to export				
Document type	☐ ⬚	to	☐	⮕
Document	☐	to	☐	⮕
Part document	☐	to	☐	⮕
Version	☐	to	☐	⮕
Status	☐	to	☐	⮕
User	☐	to	☐	⮕
Change No.	☐	to	☐	⮕
Laboratory / office	☐	to	☐	⮕

Search option not using "Extended Search"				
Application	☐	to	☐	⮕
KPro storage location	☐			
Vault storage location	☐			
Max. number of originals	999999			

🔍 **Extended search**   ℹ️

☑ Selection list before export
☑ Test mode
☐ Export to directory on server (always batch mode)
☐ Export DIS originals as ZIP

Create ZIP when min. n originals	0
File name	Filename upper case, extension from saved file ▾
Export directory	C:\Users\CHRIS_~1\AppData\Local\Temp
Job-ID	STANDARD
Option log file	

☐ **Selection Paramter**

Parameter	*Description*
Document type	Search restriction by document type
Document	Search restriction by document number
Part document	Search restriction by part document
Version	Search restriction by document version
Status	Search restriction by document status
User	Search restriction by user

Parameter	Description
Change No.	Search restriction by change number
Laboratory / Office	Search restriction by laboratory / office
Application	Only originals with this application will be exported.
KPro storage location	For document types with storage system „KPro" only originals from storage system „KPro" will be exported.
Vault storage location	For document types with storage system „vault" only originals with storage location „ vault" will be exported.
Max. number of originals	Only as much originals as entered will be exported. (Option for test purpose).
Extended Search	Starts extended search, for details see Extended Search [10].
Selection list before export	Selection list of originals which will be exported will be displayed before processing. Function not available for background processing (batch mode).
Test mode	Only selection and display of originals which shall be exported.
Export to directory on server	If set, the originals will be written on the server. For batch processing the originals will always be written on the server.
File name	Controls the writing pattern for file name: • File name upper case, extension from saved original • All parts upper case • File name upper case, extension lower case. • File name lower case, extension upper case • All parts lower case.
Export directory	Directory on work station or server (acc. „Export to server directory) to which the originals shall be exported.
Job-ID	Job-ID for execution of process (see Mass Operations [17]).
Optional log file	Writes optional log file (see Mass Operations [17]).

ⓘ Please regard, depending on the user settings, the document status may be either internal or external (see User Settings) [10].

ⓘ If the report is processed in the background, no selection list for further restrictions will be generated.

⊟ **File Name Format**

By default the following file format will be used:

[Dokumentart]_[DokumentNr]_[Teildokument]_[Version]_[Applikation]#[DateiNr].[Extension]

[document type]_[document number]_[part document]_[version]_[application]#[file no.].[extension]

A customizing exit will allow other name conventions.

⊟ **Handling of Special Characters**

Special characters in a document number will automatically be replaced. The customizing offers 2 different methods which perform different replacement routines. While importing the files, the system checks the filenames for those escape characters and starts the inverted replacement function if one of those characters are found.

ⓘ If the filename contains the escape characters for both methods, the classic method „replacement with ASCII code" will be performed. This is necessary to ensure the backward compatibility of the function with older product versions as well as with older extracts of originals.

Classic method: Replacement with ASCII Code

This method uses one escape character. While exporting the original file, the escape character is written first, followed by the ASCII Code of the special character in the hexadecimal format.

Example:

Document type	ZNG
Part document	000
Version	00
Document number	A:123-H7A\1
Application	PDF
File No	2
Possible name	file ZNG_A~3A123-H7A~5C1_000_00_PDF#2.pdf (~3A stands for : and ~5C for \ )

New method: Replacement with Unicode Codes

This method also uses an escape character. But in difference to the classic method, a closing escape character is used as well since the amount of replacement characters for each special character can vary (This is due to the definition of Unicode Codes). In the export process the escape character is written first, followed by the Unicode-Code of the special character in numerical format. Finally the closing escape character is added. The two escape characters cannot be set in the customizing, in contrast to the classic method, but are fixed characters: { and }.

Document type	ZNG
Part document	000
Version	00
Document number	A:123-H7A\1

Application	PDF
File No	2
Possible name	file ZNG_A{58}123-H7A{92}1_000_00_PDF#2.pdf ({58} stands for : and {92} for \ )

3.2.1.3   Import Originals

This function allows importing original files from another directory. They can be added to the document info record or existing originals can be replaced.

This way it is possible to restore template originals on the test system after a system copy from the productive system. (See also Export Originals [20]). Another option is a periodical import of view files from a CAD system or the initial loading of originals in case of data transfer.

Customer exits allow client specific file import. Originals can be filter or analyzed by the file name.

The import function is implemented as ABAP report and can also run in the background (batch).

The function is protected by authorization (See also document ProNovia SAP PLM Administrator, Customizing Manual).

Customer exists allow adjusting the processing of the file name. Also client specific action before selection and/or processing can be defined.

Selection Screen

Import originals

Importaction
- (●) Replace if existing
- ( ) Replace, show error if not existing
- ( ) Replace, if missing add
- ( ) Add new (always)
- ( ) Add if missing
- ( ) Add, error if existing

How to identify originals
- (●) Identify via application type (file number and name not relevant)
- ( ) Identify via original number

Store originals in

| Storage location KPro | |
| Storage location vault | |

Without storage location, originals will only be linked, no checked-in.

Log- and control options
- [✓] Selection list before import
- [✓] Test mode
- [ ] Import from directory on server (batch mode)

Import directory	C:\Users\FRAUKE~1.BOE\AppData\Local\Temp\3
Job-ID	STANDARD
Option log file	
Move file to ... on error	

- (●) Move to ... if OK
- ( ) Delete imported files if OK or file to be ignored

Selection Parameter

Parameter	Description
Replace if existing	Original, which are found according the file number or the application in the document info record will be replaced by the imported original. All other originals will be ignored.
Replace, show error if not existing	Same function as described above, for originals which cannot be assigned properly, an error will be recorded.
Replace, if missing add	The original, which shall be imported will either replace the original with matching file number or application, else it will be added.

Parameter	Description
Add new (always)	All originals will be added to the document info record, no matter which originals already exist.
Add if missing	The originals, which shall be imported, will only be added, if no matching original is found with matching file name and application.
Add, error when existing	Same function as described above under „Add if missing", but for already existing file numbers or application an error will be recorded.
Check via application type (file number and name not relevant)	Originals will be replaced dependent on the application. This option is recommended for uploading of originals.
Check via original number	Originals will be imported accordingly to their original number. This option is recommended to recover originals after a system copy.
Storage location KPRO	Defines where originals of document info records will be stored, if the „KPro" is used as storage location system.
Storage location vault	Defines where originals of document info records will be stored, if „vault" is used as storage location system (Flag „KPro" not set in customizing).
Selection list before import	List of originals will be displayed before import. The option is not available when import function is running as background process (batch).
Test mode	Only selection of originals to be imported, check and display of the list is processed.
Import from directory on server (batch mode)	If set the originals will be read on the server (SAP-System). For background processing only reading on server.
Import directory	Directory on workstation or server (acc. „import from server directory"), from which the originals will be imported.
Job-ID	Job-ID authorization (see also Mass Operations [17]).
Option log file	Creation of optional log files (see also Mass Operations [18]).
Move file to … on error	In case of error during checking the original attributes or document attributes or during the check-in process, the respective originals will be moved to this directory. The file will be moved to a local directory or to a server directory, depending the above setting "Import from directory on server (batch mode)".
Move to… if ok	Successfully imported originals, and those which have been ignored, will be moved to this directory after the check-in. The file will be moved to a local directory or to a server directory, depending the above setting „Import from directory on server (batch mode)".
Delete imported files if OK or file to be ignored.	Successfully imported originals or those which have been ignored, will be deleted after the check-in.

For background processing all directories and files must be accessible on the SAP server.

☐ File Name Format Convention

By default the file search will search for files showing the following file name format convention. Customizing allows defining a different convention.

[Dokumentart]_[DokumentNr]_[Teildokument]_[Version]_[Applikation]#[DateiNr].[Extension]

[document type]_[document number]_[part document]_[version]_[application]#[file no.].[extension]

☐ Handling of Special Characters

Read paragraph Handling of Special Characters [23] in Export Originals [23] for more specific information.

3.2.1.4   Disconnect Originals

This function allows disconnecting original files from document info records. However originals will not be deleted physically, only its link to the document info record will be removed. This option can be useful after a system copy, when originals shall be disconnected from the original storage location of a productive system. Only necessary when according to the system configuration, the originals on the original storage location of the productive system are accessible from the target system (typically integration system).

This function must never be allowed on a productive system!

After a client copy on the system and when using KPro as storage location system, this function should also not be uses, because some KPro system tables are not client capable.

The function is protected by authorizations (see also ProNovia SAP PLM Administrator, Customizing Manual).

Customer exits provide additional document filter.

☐ Selection Screen

☐ Selection Parameter

Parameter	Parameter Description
Document type	Search restriction by document type
Document	Search restriction by document number
Part document	Search restriction by part document
Version	Search restriction by document version
Status	Search restriction by document status.
Application	Search restriction by application
User	Search restriction by user
Change No.	Search restriction by change number
Laboratory / Office	Search restriction by laboratory / office
KPro storage location	For document types with storage system „KPro" only originals from storage system „KPro" will be disconnected.
Vault storage location	For document types with storage system „vault" only originals with storage location „vault" will be disconnected.

Parameter	Parameter Description
Max. number of originals	Only as much originals as entered will be disconnected. (Option for test purpose).
Selection list before disconnecting	Selection list of originals which will be disconnected will be displayed before processing. Function not available for background processing (batch mode).
Test mode	Only selection and display of originals which shall be disconnected.
Job-ID	Job-ID for execution of process (see Mass Operations) [17].
Optional log file	Writes optional log file (see Mass Operations [18]).

3.2.1.5   Delete Content Versions

This function allows deleting **inactive** content versions. The active version will **never** be deleted. The number of content versions which shall be kept can be defined together with the application.

🔒 The function is protected by authorizations (see also ProNovia SAP PLM Administrator, Customizing Manual).

ⓘ Using the change management functions, the validity of characteristic values can be determined by the date or dependent on parameters. If a class type was defined, the function cannot be used.

🛠 The selection can be filtered additionally by customer exits.

3.2.2   Classification / Characteristic Values

This function allows the manipulation of characteristic values and class assignments over a certain number of document info records. Characteristic values can be exchanged (e.g. storage location, defined as a characteristic), deleted, copied or missing classifications can be set and classes can be assigned.

Additionally it is possible to change the classification status of classification assignments to „released" without checking.

🔒 The function is protected by authorizations (see also ProNovia SAP PLM Administrator, Customizing Manual).

ⓘ Using change management options it will be possible to determine the validity of characteristic values per key date or dependent on parameters. Some classification settings will not allow this function.

🛠 Customer exits provide intensive influence on all functions.

Selection Screen

Selection Parameter

Parameter	Parameter Description
Replace value	Replaces the characteristic value in all selected document info records. (With value which is defined as described below under option „Value to search/set/replace" or „New characteristic value").
Assign if not valued	The value from option „New characteristic value" will be assigned to all documents info records, which do not have any assigned characteristic value so far.
If multiple values, also if missing	Addition to function above „Assign value if not valued": the object will be regarded as non-valued for multiple characteristic values if the value has not been assigned.

Parameter	Parameter Description
Copy value	Copy of value found acc." Value to search/set/replace" from characteristic „characteristic name" to "characteristic to", if characteristic has not been valued so far.
Replace any old value	Addition to function „Copy value": the value will be copied even when the target value has already been valued, e.g. the current value will be overwritten.
Delete value	Deletes the valuation for characteristic in all document info records, if value equals the value from option „Value to search/set/replace"
Assign class if missing	Assignment of class to all document info record if missing.
Set class status to released	Document info records, which have class assignments with classification status „released", will no longer be found with class search transaction „CV04N" (Standard behavior SAP R/3). This function will change the classification status of class assignments to „released". Without check of a complete classification, serves mainly to correct the classification status after data transfer, if not all characteristic have been valued.
Document type	Search restriction by document type
Document	Search restriction by document number
Status	Search restriction by document status
User	Search restriction by user
Change No.	Search restriction by change number
Class status locked	Function set class status to „released": search for class assignments with a locked classification status.
Class status „incomplete manual"	Function set class status to „released": search for class assignments with a „incomplete manual" classification status.
Class status „incomplete system"	Function set class status to „released": search for class assignments with a „incomplete system" classification status.
Extended search	Starts extended search, details see Extended Search [10].
Class type	Class type, for document info records „017"
Class	Search restriction by class. Without a class the operation will be performed on all classes with this characteristic. With a defined class the operation will be performed only on these specific classes. For certain functions a class is required.
Characteristic name	Name of the characteristic which shall be manipulated.
Characteristic to	Name of the characteristic, to which the value is written for function

Parameter	Parameter Description
	„Copy value".
Value to search/set/replace	Value which will be searched in functions above „Replace value". „Assign value if not valued" and „Copy value". However for the last two functions it is possible to use a search mask (*).
New characteristic value	This value will be set for function „Replace value" and „Assign value if not valued".
Show list before starting	List of document info records will be shown before processing.
Log file	Creation of optional log file (see Mass Operations [18]).

(i) Print screen above shows all possible parameters. Depending on the selected functions only the relevant parameters will be displayed.

(i) When copying a multiple characteristic to a single value target characteristic please consider the following:

Only the first original value (acc. internal value counter) will be used and written as target value. A more variable selection of set to be used must be realized by customer exits.

(i) Characteristic values will be created without relation to the class (SAP standard). This way any action with restriction on classes can have influence on other classes. If a value is deleted, it will be deleted in all classes which are having this value, also when operating with a class selection.

(i) If values shall be set for multiple characteristics, the function must be called repeatedly. Each run will only handle one value.

3.2.3 Migration

The migration sub menu provides various SAP DMS migration functions.

3.2.3.1 Document Status Migration

Special function to migrate the document status. This may be necessary after a modification of the status net for a certain document type.

Status entries will be modified in the document info record as well as in the status log. Change documents about status changes will not be corrected.

Standard search will not find documents with document status „FROM" only in the document info record but not in the status log. Those documents must be found with extended search transaction CV04.

🔒 Function protected by authorization (see also ProNovia SAP PLM Administrator, Customizing Manual).

⚒ The documents can be filtered additionally by customer exits. Client individual actions are also possible before and after the change process.

□ **Selection Screen**

Mass operation migration document status

Doc. selection

Document type	☑
Document	[ ] to [ ]
User	[ ] to [ ]
Change number	[ ] to [ ]
Max. number of documents	999,999

🔍 Extended search   ℹ

Change status to

From	[ ]
To	☑

Options

Optional log file	[ ]
☑ Testmode, display list only	

□ **Selection Parameter**

Parameter	Parameter Description
Document type	Input restriction for document type
Document	Input restriction for document number
User	Input restriction for user
Change number	Input restriction for change number
Max. number of documents	Restriction of number of document info records for this function, useful for tests.
Extended search	Starts the extended search, for details see Extended Search [10].
From	This status will be replaced in all found document info records to the status as defined under „To".
	Enter standard translation for status as listed in ProNovia SAP PLM Administrator, Customizing-Manual .
	Attention: documents, which have first been handled without status, then a status has been set and now a status is assigned with this mass function (from blank to a certain status) a status log entry will be written including current date, time and user.

Parameter	Parameter Description
To	Status „From" will be replaced with this status in all document info records. Enter standard translation for status as listed in ProNovia SAP PLM Administrator, Customizing-Manual.
Optional log file	Creates optional log file (see also Mass Operations [17]).
Test mode, only display list	Relevant document info records will only be listed and displayed.

3.2.3.2   Document Type Migration

Special function to migrate the document type. All data and links will remain. All usages of the document info records will be adapted, too. (BOM, production resources and tools, etc.).

Please note, that the migration of document types in IS-H tables is not supported and that the document types will stay as before in these tables!

This function is protected by authorizations (See documentProNovia SAP PLM Administrator, Customizing Manual).

The documents can be filtered additionally by customer exits. Client individual actions are also possible before and after the change process.

☐ **Selection Screen**

Migration of document types

Selection FROM						
FROM document type	☑					
Document			to			▣
Part document		▣				
Change number			to			▣
User			to			▣

🔍 Extended search   ℹ️

Selection TO	
TO document type	☑

Options	
Optional log file	
☑ Show list before starting	
☑ Testmode, display list only	

☐ **Selection Parameter**

Parameter	*Parameter Description*
FROM document type	Document type which will be migrated to „TO document type".
Document	Search restriction by document
Part document	Search restriction by part document
Change number	Search restriction by change number
User	Search restriction by user
Extended search	Starts the extended search, for details see Extended Search [10].
TO document type	New document type to which the selected document info records shall be migrated to.
Optional log file	Creates optional log file (See also Mass Operations [18]).
Show list before starting	List of document info records, which will be handled will be displayed before processing.
Test mode, only list display	Only selection and display of relevant document info records.

☐ **Status Mapping**

In case the status net of the target document is different from the status net of the source document type, a status conversion is required. In a selection screen, the possible status FROM to the possible corresponding status TO must be selected. Suitable status will be listed.

Change View "Status mapping doc type migration": Overview

Status mapping doc type migration

Doc.type FROM	Doc.Stat.	Document type TO	Doc.Stat.
TSP	AA	ZNG	AA
TSP	BA	ZNG	BA
TSP	FD	ZNG	?
TSP	FP	ZNG	?
TSP	FR	ZNG	FR
TSP	IA	ZNG	IA
TSP	IB	ZNG	IB
TSP	OA	ZNG	?
TSP	PR	ZNG	PR
TSP	SP	ZNG	SP
TSP	UG	ZNG	?
TSP	X0	ZNG	?
TSP	ZG	ZNG	ZG
TSP	ZP	ZNG	ZP

All registered values will be saved and provided for next function runs with same document types.

3.2.3.3 Part Document Migration

This function allows migrating part document types into other part document types. All data and links will remain. All usages of the document info record will be adapted, too (BOM, Production resources and tools, etc.).

Please note, that the migration of part document in IS-H tables is not supported and that the part document will stay as before in these tables

This function is protected by authorizations (See document ProNovia SAP PLM Administrator, Customizing Manual).

The documents can be filtered additionally by customer exits. Client individual actions are also possible before and after the change process.

⊟ Selection Screen

⊟ Selection Parameter

Parameter	*Parameter Description*
Part document FROM	Document info records with this part document type will be searched and migrated.
Document	Search restriction by document
Part document	Search restriction by part document
Change number	Search restriction by change number
User	Search restriction by user
Extended search	Starts the extended search, for details see Extended Search [10].
Part document TO	New part document to which the selected document info records shall be migrated to. The part document may be set in client specific enhancements acc. certain conversion rules per document.
Optional log file	Creates optional log file (See also Mass Operations) [18].
Show list before starting	List of document info records, which will be displayed before processing.

Parameter	Parameter Description
Test mode, only list display	Only selection and display of relevant document info records.

3.2.4   Field Conversion / Various

The sub menu provides various mass functions for the implementation of specific SAP DMS fields.

3.2.4.1   Document Description Copy

This functions allows copying of the DIR descriptions in other languages, which have empty/initial description fields. Up to 5 template languages can be set, with increasing priority. A search will always start with priority 1, if no description is found, priority 2 is used and so on.

Only the description will be copied, but not the long text.

Function protected by authorization (see also ProNovia SAP PLM Administrator, Customizing-Manual).

☐ **Selection Screen**

Fill in missing language text

Remark: NO longtext will be transfered

Missing language to fill

Language	☑

Fill missing text from language

Priority 1	EN
Priority 2	
Priority 3	
Priority 4	
Priority 5	

Doc. selection

Document type		to		
Document		to		
Status		to		
Laboratory / design office		to		
Change number		to		
User		to		

🔍 Extended search   ℹ️

◉ Test mode
○ Show selection list
○ Execute directly
☐ Write change documents

⊟ **Selection Parameter**

Parameter	*Parameter Description*
Language	Missing language to fill.
Priority 1	First template language of the text to be searched.
Priority 2	Second language to fill (optional).
Priority 3	Third language to fill (optional).
Priority 4	Fourth language to fill (optional).
Priority 5	Fifth language to fill (optional).
Document type	Selection restriction on document type
Document	Selection restriction on document
Status	Document status
Laboratory / design office	Selection restriction on laboratory / design office
Change number	Selection restriction on change number
User	Selection restriction on change number
Test mode	All document info records, selected base on the parameters will be directly listed as results, no actions on the data base.
Show selection list	The list of document info records to be handled will be shown before processing.
Execute directly	Selected document info records will be change without any further user input.
Write change document	If activated, change logs will be written. Attention: Large data quantities may slow down your system.

3.2.4.2   Exchange Responsible

This function allows exchanging the registered responsible user by another. This may become necessary after a crew change.

🔒 This function is protected by authorizations (See document ProNovia SAP PLM Administrator, Customizing Manual).

☐ **Selection Screen**

Change responsible in documents

Previous person responsible	☑		
New person responsible	☑		

Doc. selection

		to		
Document type		to		➡
Document		to		➡
Status		to		➡
Laboratory / design office		to		➡
Change number		to		➡

🔍 Extended search   ℹ️

☐ Change status log line
◉ Test mode
○ Show selection list
○ Execute directly
☐ Write change documents

☐ **Selection Parameter**

Parameter	Parameter Description
Previous person responsible	Responsible person to be replaced.
New person responsible	New responsible person to be registered.
Document type	Search restriction by document type
Document	Search restriction by document number
Status	Search restriction by document status
Laboratory / Design office	Search restriction by laboratory / office
Change number	Search restriction by change number
Extended search	Starts the extended search, for details see Extended Search[10].
Change status log line	If activated, all users with a status in the status protocol lines for selected documents will be replaced „Old user" and „New user".

Parameter	Parameter Description
Test mode	Document info records, which have been selected acc. to the parameters above will be displayed directly in a result list, but without any action in the data base.
Show selection list	List of relevant document info records will be displayed before execution.
Execute directly	Relevant document info records will be migrated without further user input.
Write change documents	Mark this box if you want to write change documents. Attention: A big amount of data can slow down this function!

(i) Status log should only be migrated in case of a true migration, e.g. when reorganizing the user names.

3.2.4.3   Authorization Group Migration

This function allows the migration of the field "authorization group".

⊟ **Selection Screen**

⊟ **Selection Parameter**

Parameter	Parameter-Description
Old authorization group	Search restriction by authorization group actually set in the documents.
New authorization group	Authorization group to be set.
Document type	Search restriction by document type.
Document	Search restriction by document number.
Status	Search restriction by document status
Change number	Search restriction by change number
Test mode	Document info records, which have been selected acc. to the parameters above will be displayed directly in a result list, but without any action in the data base.
Show selection list	List of relevant document info records will be displayed before execution.
Execute directly	Relevant document info records will be migrated without further user input.
Write change documents	Mark this box if you want to write change documents. Attention: A big amount of data can slow down this function!

3.2.4.4   Change Laboratory in Documents

This function allows the setting of the field laboratory/office in documents.

☐ **Selection Screen**

☐ **Selection Parameter**

Parameter	Parameter Description
Previous laboratory / office	Search restriction by laboratory/office actually set in the documents.
New laboratory / office	Laboratory / office to be set.
Document type	Search restriction by document type
Document	Search restriction by document number
Status	Search restriction by document status
Change number	Search restriction by change number
Test mode	Document info records, which have been selected acc. to the parameters above will be displayed directly in a result list, but without any action in the data base.
Show selection list	List of relevant document info records will be displayed before execution.

Parameter	Parameter Description
Execute directly	Relevant document info records will be migrated without further user input.
Write change documents	Mark this box if you want to write change documents. Attention: A big amount of data can slow down this function!

3.2.5   Deletion

Mass functions for the deletion flag and deletion operations for document info records.

3.2.5.1   Change Deletion Flag of Document

This option allows setting and resetting of the delete flag in a selection of document info records.

Usages will not be checked. This is provided during operation (see <u>Delete Marked Documents Definitely</u> 46).

This function must be used very carefully. It mainly serves for cleaning up data on test systems and to delete wrong data after a migration. It is not recommended to hand out authorization for this function.

The function is protected by authorizations (See document ProNovia SAP PLM Administrator, Customizing Manual).

▣ Selection Screen

▣ Selection Parameter

Parameter	Parameter Description
Document type	Search restriction by document type
Document	Search restriction by document number
User	Search restriction by user
Status	Search restriction by status
Laboratory / design office	Search restriction by laboratory and office
Change number	Search restriction by change number.
Set delete flag	If not set (default), the function searches for document info records, which have set the delete flag and resets them. If set, the selection will be vice versa and the delete flag will be set.
Show selection list	List of relevant document info records will be displayed before execution.
Write change documents	Mark this box if you want to write change documents. Attention: A big amount of data can slow down this function!

3.2.5.2   Delete Marked Documents Definitely

This function will delete document info records which are marked for deletion from the SAP R/3 System.

The SAP DMS standard program will be used, but opposite to a direct use it is possible to select the documents to be deleted singularly all or in a block.

Procedure:

1. Selection of document type.

2. Selection of documents in the list of document info records with a deletion flag and matching document type.

3. Data transfer to SAP-DMS standard report. As an option a deletion test is possible.

Although an input of the document type is provided for step 3, it can no longer be changed.

The function is protected by authorizations (See document ProNovia SAP PLM Administrator, Customizing Manual).

3.3   Additional Functions

ProNovia SAP PLM Administrator provides additional functions for document info records and related areas. In the following topics only functions are described, which are not standard functions and do not correspond to SAP R/3 programs or other ProNovia products.
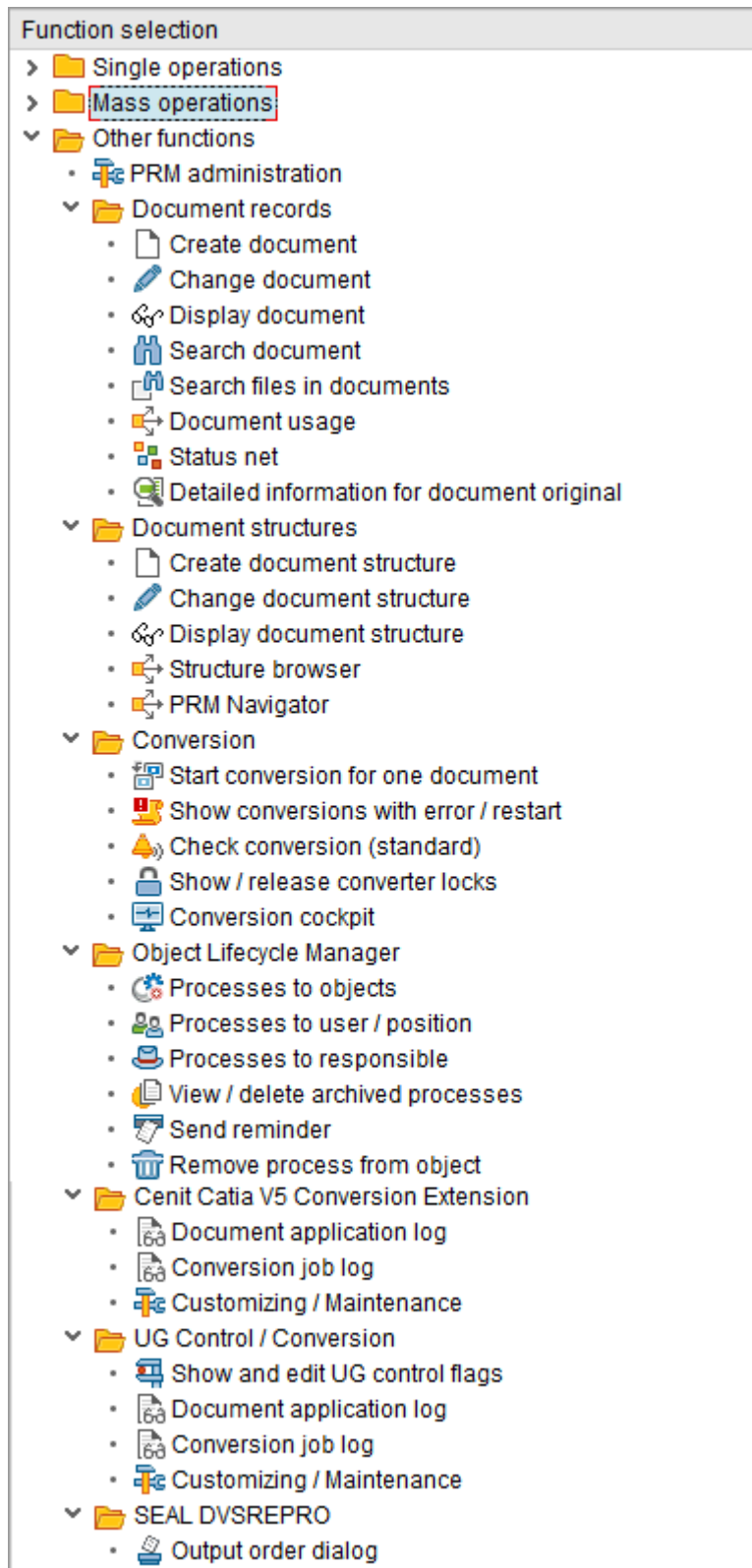
3.3.1 Search Files in Documents

Function to search for documents using original attributes (application, file name extension, storage etc.) or to search documents which have no application assigned. (Option search missing originals / search documents, which do not have this application assigned.)

⊟ **Selection Screen**

3.3.2 Show Conversions with Error / Restart Conversion

Within a limited data range this function will search incorrect conversions and offers a restart. This can be helpful, when a conversion server wasn't functioning correctly over a certain period of time and all conversion jobs during this time period have to be repeated. This function can also be used for a daily control of the conversion. Without any input it will be indicated whether the conversion was possible or not. Only the last conversion of a document will be relevant.

ⓘ This function can only evaluate and display the described data, when in the conversion specifications

(SAP customizing) option „Additional messages at beginning and end of each conversion" are set.

This function is protected by authorizations (See document ProNovia SAP PLM Administrator, Customizing Manual).
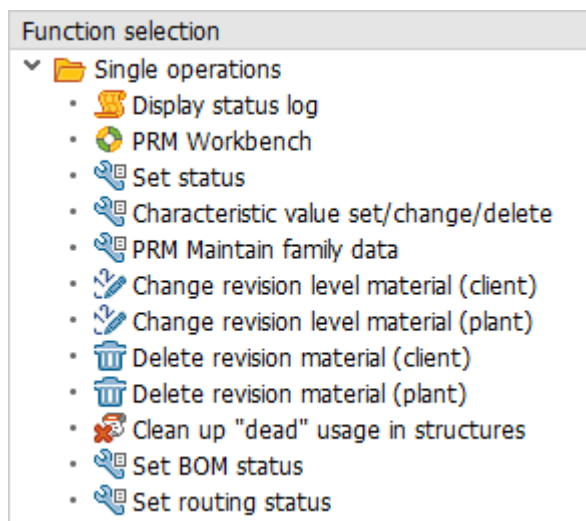
☐ **Selection Screen**

☐ **Selection Parameter**

Parameter	Parameter Description
Document type	Search restriction by document type
Document	Search restriction by document number
Search log … days back	Search for inputs in the application log for conversion, which are not older than … days.
Also show successfully converted documents	If set, also log entries of successfully converted documents will be listed.
Standard log display with selection for conversion	Conversions found will be listed with standard log display. Then all documents which shall be re-converted can be selected (see also below). Else if this option is not activated all found documents will be selected for re-conversion.
Control display before starting conversion	Before calling the re-conversion another screen with all selected documents will appear.

ⓘ At least one of these options must be selected.

☐ **Additional Functions in the Log Display**

Icon	Description

⟐	Mark document in current log line for conversion.
🗒	All displayed documents marked for conversion.
🗒	All selections for conversion have been removed.

3.3.3 Show / Release Converter Locks

Function to check the status of the system conversion server and to enable the release of locked conversion orders.

This function is similiar to SAP R/3 standard report „CONV_FREE_CONVERTER" although this report doesn't indicate locked converters and doesn't allow selections.

ⓘ The function is protected by authorizations (See document ProNovia SAP PLM Administrator Customizing Manual).

4 Functions for Material Master Records

This chapter describes the functions to maintain and manipulate material master records.

The functions are divided into:

4.1 Single Operations

The following single operations are available:

4.1.1 Display Status Log

Display of status log for currently selected material master.

ⓘ This function is only available, when ProNovia SAP PLM ProcessManager is installed on the system.

4.1.2   PRM Workbench

Starts the ProNovia SAP PLM ProcessManager Workbench for current material.

This function is only available, when ProNovia SAP PLM ProcessManager is installed on the system.

4.1.3   Set Status

Function enables to set different material status fields, independent from current status. This function may be necessary when a separate status net has been implemented on this status. (e.g. when using ProNovia SAP PLM ProcessManager).

Function protected by authorization.

Customer exits allows to check and change data before action. Additional actions before and after the up-date are also possible.

If ProNovia SAP PLM ProcessManager (PRM) is installed on your system, additional input fields are available.

Whether change documents will be written after a change request or not, can be defined in the customizing of the ProNovia SAP PLM Administrators and cannot be changed in this dialog.

The display of the input fields depends on the material master views and also on additionally selected status and the PRM customizing.

Invalid values and combinations acc. to PRM will be accepted.

For the processing scenario a search help is implemented, which offers valid combinations of status und processing scenarios. By choosing a processing scenario, the status won't get automatically chosen as well. The status has to be set separately on the screen.

If PRM is active and the specified material status allows the setting of a date element, then it's also possible to set it. For related (subordinated) PRM objects, the date element will be set also (if possible).

ⓘ Depending on installed products and active options, the user screen can be different.

4.1.4   Characteristic Value Set/Change/Delete

Function to set, change or delete single characteristic values, regardless of the cross plant material status (see also Set Status [52]) or the settings of the definition of the characteristic values (e.g. display only).

ⓘ Based on the change management system the validity of characteristic values can be determined in relation to the validity date or regardless of parameters. Depending on the class type, this function

cannot be used.

🔒 The function is protected by authorization.

🛠 Customer exits allow setting of individual characteristic values.

4.1.5 PRM Maintain Family Data

This function allows maintaining the ProNovia SAP PLM ProcessManager family data of the current material.

ⓘ Function is only available when ProNovia SAP PLM ProcessManager is installed on your system.

4.1.6 Change Revision Level Material (Client)

This function allows changing the revision level (client specific). Function checks if revision level is allowed acc. to customizing.

🔒 The function is protected by authorization.

ⓘ Multiple assignment of a revision level is used within the ProNovia SAP PLM ProcessManager.

4.1.7   Change Revision Level Material (Plant)

This function allows changing a revision level (plant specfic). The plant can be selected. After the selection, the procedure is equal to <u>Delete Revision Level Material (Client)</u> [55]

ⓘ   This function is only available if ProNovia SAP PLM ProcessManager is installed and plant revisions activated.

4.1.8   Delete Revision Level Material (Client)

This function allows deleting a revision level of a material master record (client). This functions is similar to the delete function of revisions in a change process, but easier to handle. If a BOM is existing to the material and the change number of the selected revision has a change in the BOM, an additional warning will be posted.

🔒   The function is protected by authorization.

✖ Customer exits allow client specific actions before or during the refresh.

4.1.9 Delete Revision Level Material (Plant)

This function enables deleting of a revision level in a material masters plant record. If a BOM exists for a certain material and with the change number for this revision a change of the BOM was realized, an additional warning will be posted.

🔒 The function is protected by authorization.

ⓘ This function is only available if ProNovia SAP PLM ProcessManager is installed and plant revisions activated.

4.1.10 Clean Up "Dead Usage" in BOM

Any position which has been inserted in a BOM and then deleted with the same change number, is no longer active or visible, but still existing. Certain material master changes may not be allowed, because the material is still used in the BOM. For example when changing the basic material unit, changing the material type or deleting the material.

This function will search these positions and delete the position on request.

🔒 The function is protected by authorization.

4.1.11 Set BOM status

This function allows setting a BOM status, if at least one exists for the chosen material. If multiple BOM exists, one has to chose which BOM should be altered.

When changing a BOM status, no integrated processes will be triggered. The status will be set directly on the database, without further control (e.g. on PRM object dependencies).
This may result in data inconsistencies, if the user is not aware of other dependencies or is not respecting them.

The function is protected by authorizations. See also ProNovia SAP PLM Administrator Customizing Manual.

4.1.12   Set routing status

This function allows setting a routing status, if at least one routing exists for the chosen material.If multiple routings exists, one has to chose which BOM should be altered.

When changing a routing status, no integrated processes will be triggered. The status will be set directly on the database, without further control (e.g. on PRM object dependencies). This may result in data inconsistencies, if the user is not aware of other dependencies or is not respecting them.

The function is protected by authorizations. See also ProNovia SAP PLM Administrator Customizing Manual.

4.2 Mass Operations

The following mass operations are available:

> Mass operations
> · ⌷ Classification / Characteristic values
> · ⌷ Set status
> · 🗑 Delete PRM data

4.2.1 Classification / Characteristic Values

This function allows manipulating characteristic values and classifications over several selected material master records. Characteristic values can be deleted, copied or missing valuations and assignments can be added.

Additionally it is possible to set the classification status from class assignments to a status „released" without any checks (opposite to SAP R/3 – standard auxiliary tools).

The change management allows determining the validity of characteristic values dependent on the key date or parameters. Depending on the class settings this option may not be available.

Function protected by authorization.

Customer exits allow detailed influence on all functions.

☐ **Selection Screen**

ⓘ Picture above shows all possible parameters. Depending on the function, only the relevant parameters will be visible.

☐ **Selection Parameter**

Parameter	*Parameter Description*
Replace value	Replaces the searched characteristic value in all selected material master records. Value set in option „Value to search/set/replace" will be searched and replaced by with the new characteristic value
Assign value if not valued	The „New characteristic value" will be assigned to all selected material master records, which are not assigned.
If multiple values, also if missing	Addition to function above for multiple values. If the new characteristic value is not set the object will be regarded as unassigned.

Parameter	Parameter Description
Copy value	Copy of value found acc. to option „Value search/set/replace" from „Characteristic name" to Characteristic to", if the value has not been assigned.
Replace any old value	Addition to function „Copy value". The value will be copied even the target characteristic has been already assigned. The current value will then be overwritten.
Delete value	In all selected material master records the assignment of the respective characteristic will be deleted if the assignment matches the setting in „Value to set/search/replace".
Assign class if missing	Assigns this class to all material master records, to which this class has not yet be assigned.
Set. Cl. status to released	This function will set the classification status of class assignments to „released". This without any check of complete classification. It mainly serves to correct classification status after a data transfer and if not all characteristics have been assigned.
Material	Input restriction for material.
Material type	Input restriction for material type.
Cross plant status	Restriction on cross plant material status.
Cl. status locked	Function „Set cl. status to released": Searches class assignments, with classification status „locked".
Cl. status incomplete manual	Function „Set cl. status to released": Searches class assignments, with classification status „Incomplete manual".
Cl. status incomplete system	Function „Set cl. status to released": Searches class assignments, with classification status „Incomplete system "
Extended search	Starts extended search. For details please refer to 0 ‚Extended Search.
Class type	Class type to handle, for material master records, the standard class type is „001"
Class	Restriction for class. Without class input, the operation will be executed on all classes with this characteristic value. Else on all classes with this characteristic. Certain functions require a class input.
Characteristic name	Characteristic value which shall be manipulated.
Characteristic to	For function „Copy value": characteristic value where the new value shall be written to.
Value to search/set/replace	Value after which function „Replace characteristic / delete assignment / copy value" will search. For the last two functions it is also possible to work with a search mask (*).

Parameter	Parameter Description
New characteristic value	Value used for function „Replace characteristic value „ / „ Assign value if not valued"
Show list before starting	List of relevant material master records will be displayed before processing.
Log file	Function messages will be written to the separate file as entered (including path) If only the path is defined, followed by an asterisk, a standard name with date and time will be used.

4.2.2 Set Status

The mass operation „set status" will set the material status in the respective tables of the material master records (MARA, MARC, MVKE) and if installed also writes ProNovia SAP PLM ProcessManager status log records.

☐ **Selection Screen**

ATTENTION: The selection screen changes dynamically acc. the selected function.

If e.g.the selection option "Plant" will be shown for the function "Plant specific material status", or the selection options for "Sales Organization" and "Distribution Channel" will be shown for the function "Distr.chain spec. status".

Mass operation material status

Function

- Cross plant material status ⦿
- Plant specific material status ○
- Cross dist. chain status ○
- Distr.chain spec. status ○

Selection

Material	to	
Config.Type	to	
Material Type	to	
X-plant matl status	to	
Proc.Scenario	to	

Action parameter

Set status ☐	X-plant status	
Write PRM-status log ☐		

Options

Log file	
Test mode	☑

⊟ Selection Parameter

Parameter	Parameter Description
Cross plant material status	Setting of x-plant material status (plant independent, material master table MARA).
Plant specific material status	Setting of plant specific material status (plant dependent, material master table, MARC).
Cross dist. chain status	Setting of cross distribution chain material status (independent of distribution chain, material master table MARA).
Distr. chain spec. status	Setting of cross distribution chain specific material status (dependent of distribution chain, material master table MVKE).
Material	Search restriction by material number
Conf. Type	Search restriction by configuration type (ProNovia PRM)
Material Type	Search restriction by material type

Parameter	Parameter Description
X-plant material status	Search restriction by current material status in material master record
Proc.Scenario	Search restriction by processing scenario
Set status	The material status will only be set when this field is activated.
(…) status	New status to be set. Which status it is depends on the chosen function. An empty status (Initialisation/Deletion of the status) is not supported.
Write PRM status protocol	Set ProNovia PRM values and the according status log record. If this marker is set, but the selected material is not a PRM material (= has no configuration type), then the program can only change the status in the material master. The other PRM related changes can't and won't be processed.
Def. log entry mat.	Specifies the PRM status log protocol entry (only changeable if not fixed in the PRM customizing).
Set processing scenario	The processing scenario will only be set when this field is activated.
ProNovia PRM processing scenario	Processing scenario (ProNovia PRM) to be set.
Set revision level	The revision level will only be set when this field is activated.
Revision level	Revision level to be set.
Set date element (incl. PRM objects)	The date element will only be set when this field is activated.
Date	Date element to be set.
Set change number	The change number will only be set when this field is activated. The option is only available for the function „Cross plant material status".
Change number	Change number to be set. Works only if change number is initial!
Log file	When defining a file and root, all function messages will always be written in this file. For a valid file path, followed by an asterix (*), a standard name with date and time elements will be used.
Test mode	Test mode, no changes are written to the database, only displayed.

4.2.3   Delete PRM data

This is only provided if ProNovia SAP PLM ProcessManager is installed. It calls a function to clean up ProNovia SAP PLM ProcessManager data after deleting SAP material master records or SAP dociment info records from the system.

🔒 The function is protected by authorization..

⊟ Selection Screen

ProNovia ProcessManager delete material master and document data

Clean up material data

☑ Clean up material data

Restriction material number   to

Clean up doc. data

☑ Clean up document data

Type   to

Document   to

⊟ Selection Parameter

Parameter	*Parameter Description*
Clean up material data	Clean up material data.
Restriction material number	Search restriction by material number.
Clean up document data	Clean up document data.
Type	Search restriction by document type.
Document	Search restriction by document.

4.3   Additional Functions

The following standard functions from SAP R/3 can be started from the ADM user interface:
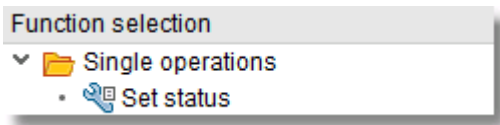
5 Functions for Change Master Record

This chapter describes the functions to maintain and manipulate change master records.

The functions are divided into:

- Single Operations for document info records [66]

- Mass operations for document info records [67]

- Additional Functions for document info records [71]

5.1 Single Operations

Only the single operation "Set status" is available

5.1.1 Set Status

If a client specific status net for the change master record has been implemented on your system, the status can be set directly with this function (e.g. with ProNovia SAP PLM Object Lifecycle Manager)

Option synchronize OLM is only available when ProNovia SAP PLM ObjectLifecycleManager is installed and the object has been assigned to a PLM process.

Whether change documents will be written is defined in the ProNovia SAP PLM Administrators customizing and cannot be changed in this dialog.
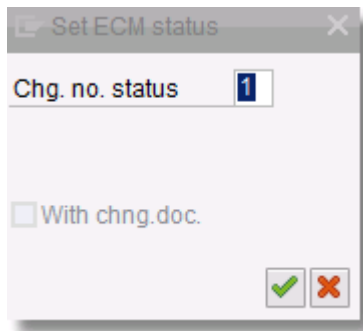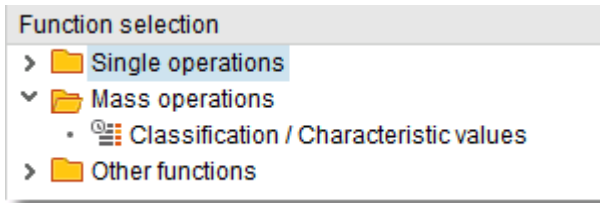

ⓘ The function is protected by authorization.

✖ Customer exits allow searching a distinctive status.

5.2   Mass Operations

Only mass operation "Classification/Characteristic Values" is available.

5.2.1   Classification / Characteristic Values

This function allows handling of characteristic values and class assignments for several selected material master records. Characteristic values can be exchanged, deleted, copied, missing assignments and valuations can be added.

Additionally it is possible to set the classification status from class assignments to a status „released" without any checks (opposite to SAP R/3 – standard auxiliary tools).

 The change management allows determining the validity of characteristic values dependent on the key date or parameters. Depending on the class type settings this option may not be available.

 The function is protected by authorization.

 Customer exits allow detailed influence on all functions.

Selection Screen

ⓘ | Picture above shows all possible parameters. Depending on the function, only the relevant parameters will be visible.

Selection Parameter

Parameter	Parameter Description
Replace value	Replaces the characteristic value in all selected change master records. The value listed under parameter „Value to search/set/replace" will be replaced with parameter „New characteristic name.

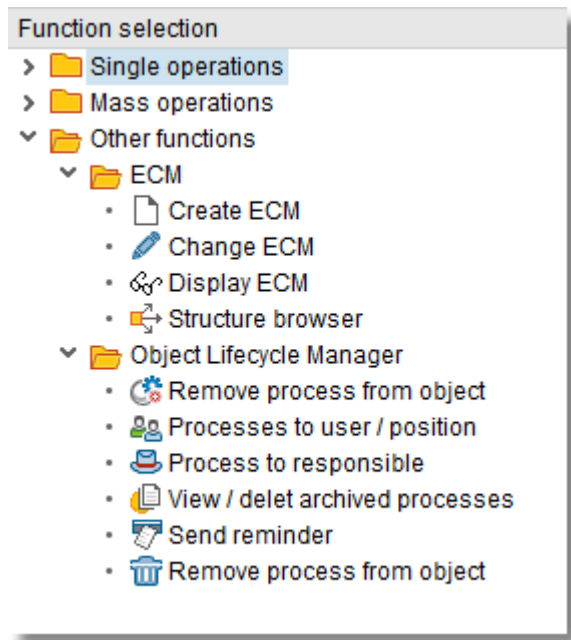| Parameter	Parameter Description
Assign value if not valued	All selected change master records with characteristic without value will be assigned to parameter "New characteristic name".
If multiple values, also if missing	Addition to function above. Multi valued objects are regarded without value, if the value to be set has not been assigned.
Copy value	Copy of the value found, acc. parameter „ Value to search/set/replace" from the characteristic name into „Characteristic to", as long as the characteristic has not been valued.
Replace any old value	Addition to function „Copy Value". The characteristic will be valued, even when the target value has already been valued, e.g. the current value will be overwritten.
Delete value	Deletes the characteristic in all selected change master records, if the actual characteristic has value acc. to "Value to search/set/replace).
Assign class if missing	Assigns this class to all change master records, which have not been assigned to this class.
Set class status to released	This function will set classification status of classification assignments to "released".
	Status change without check regarding complete classification, mainly used to correct classification status after data import, when not all characteristics have been valued.
Change number	Search restriction by change number
Valid from	Search restriction by valid from date of change master record
Status	Search restriction by status
Created by	Search restriction by user who has created the change master record.
Cl. status locked	Valid for function "Set cl. Status to released". Search for class assignments with locked classification status.
Cl. status incomplete manual	Valid for function "Set cl. Status to released". Search for class assignments with classification status "incomplete manual".
Cl. status incomplete system	Valid for function "Set cl. Status to released". Search for class assignments with classification status "incomplete system".
Extended search	Starts an extended search, for details please refer to 2.4, Extended Search.
Class type	Class type to be handled, for change master records the class default value is „025"
Class	Input restriction for the class.
	Without input, the operation runs for all classes with this characteristic. With input only for objects with this class. For certain functions a class input is required.

Parameter	Parameter Description
Characteristic name	Name of the characteristic which shall be manipulated.
Characteristic to	This input will be used for function „Copy value"
Value to set/replace/delete	Search value for function "Replace characteristic" / „Delete value" / Copy value". For the last two functions, also search masks (*) are possible.
New characteristic name	Value for function "Replace value" / Assign class if missing".
Show list before starting	The list of change master records to be handled will be shown for selection before the execution.
Log file	Function messages will be written to this file (incl. path). For a default file name created with date and time only a path name is required, followed by an asterisk (*).

ⓘ For a copy function with an originally multi-valued characteristic but only a single-valued target characteristic please regard the following:
Only the first value (acc. to internal counter) will be used and written to the target characteristic. For a selection use a customer exit „mass function characteristic value" is required, which will transfer all sets.

ⓘ Characteristic values will be registered without context to classes (SAP definition). Therefore action even with restrictions on classes can have influence on other classes. Function "delete value" will delete this value in all classes which have this value, even when working with a class selection.

ⓘ To set values to characteristics with multiple values, the function must be called repeatedly. For each run only one value will be handled.

5.3   Additional Functions

ProNovia SAP PLM Administrator provides additional functions for document info records and related areas. In the following topics only functions are described, which are not standard functions, do not correspond to SAP R/3 programs or other ProNovia products.

Function selection
- Single operations
- Mass operations
- Other functions
  - ECM
    - Create ECM
    - Change ECM
    - Display ECM
    - Structure browser
  - Object Lifecycle Manager
    - Remove process from object
    - Processes to user / position
    - Process to responsible
    - View / delet archived processes
    - Send reminder
    - Remove process from object

6 Extras

Menu option „Extras" provides functions for objects without relation to ProNovia SAP PLM Administrator.
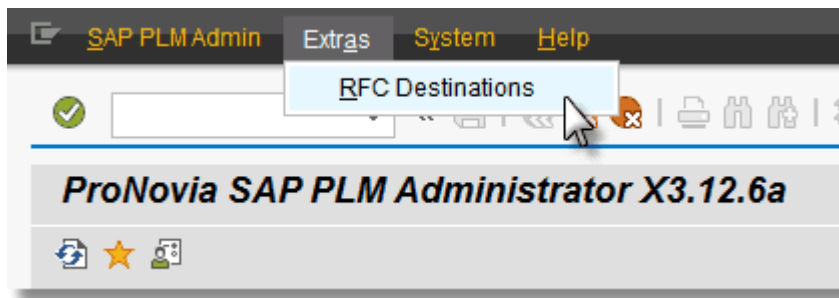
This function displays RFC destinations and allows to check the connections. The dialog is similar to standard SAP transaction SM59 „RFC Destination (display and maintenance), but no changes of connections are possible. ARFC, TRFC, as well as SNC options cannot be displayed.

🔒 | The function is protected by authorization.